



REQUEST FOR ASSISTANCE (RFA) FORM INTAKE INTERVIEW LOG

Date: 9/16/13	Interviewer: Laura Eckert	RFA #13 – 39
Person(s) Requesting Assistance: [REDACTED]		
Contact Numbers (telephone, e-mail, etc.): [REDACTED]		
Status of Person(s) Interviewed (title, position, student status, etc.): WWU student		
Requested Assistance Pertaining To (name, position, policy, project, etc.): Financial Aid Office		

To the best of your knowledge, please fill out the following:

Interviewee Status: Male ☐ Female ☒ Administrator ☐ Faculty ☐ Staff ☐ Student ☒
 Concern Regarding: Male ☐ Female ☐ Administrator ☐ Faculty ☐ Staff ☐ Student ☐ WWU Dept ☒

Category: *(Please check at least one)*

- | | | | | |
|--|--|---|-------------------------------------|--|
| <input checked="" type="checkbox"/> Age | <input type="checkbox"/> Color | <input type="checkbox"/> Creed | <input type="checkbox"/> Disability | <input type="checkbox"/> Veteran Status |
| <input checked="" type="checkbox"/> Marital Status | <input type="checkbox"/> National Origin | <input checked="" type="checkbox"/> Race | <input type="checkbox"/> Religion | <input type="checkbox"/> Retaliation |
| <input checked="" type="checkbox"/> Sex/Gender | <input type="checkbox"/> Sexual Harassment | <input type="checkbox"/> Sexual Orientation | <input type="checkbox"/> Employment | <input type="checkbox"/> Genetic Information |
| <input type="checkbox"/> Gender Identity or Expression | | | | |

Time Line		
Date	Item	Comments
9/16/13	EOO received letter from Barbara Stoneberg	See letter in file.
9/16/13		Sue called Clara, Clara emailed Rick Stefani to look into.
9/16/13	LE t/c with [REDACTED]	Scheduled intake for Tuesday 9/17 at 10:30 am.
9/17	LE t/c with [REDACTED]	<p>Review role of EOO: neutral investigators; EOO shares info only on need to know basis, but records may be requested under public records request or court order. Retaliation prohibited.</p> <p>[REDACTED] is very close to getting her English degree. There are only a limited number of classes she can get into. This quarter she could only get into 2 classes, partially because of her schedule and partially because of enrollment limits on the specific 400 level classes she needs, which are not offered every quarter. [REDACTED] works full time and can only go to school ¾ time.</p> <p>[REDACTED] has always had financial aid since coming to WWU. In January or</p>

		<p>February she applied for aid, which was denied during the summer for fall quarter. She then submitted a Maximum Allowable Credits (MAC) petition to try to begin the process of getting aid for fall. After a few weeks of back and forth, she found out the petition was denied because she had too many credits toward her degree.</p> <p>In the MAC petition, [REDACTED] had to address 3 things. This included why she had so many credits, which is b/c she is a transfer student with an AA. She had to address getting a degree evaluation. The first time her advisor submitted it, he submitted the wrong one, so she asked him to do the formal degree evaluation. She addressed all 3 things needed.</p> <p>Financial Aid wanted [REDACTED] to apply for graduation but she would be turned down for graduation b/c she was not in her last quarter. When she was denied, the person she spoke with could not explain why; she doesn't recall the person's name.</p> <p>[REDACTED] feels she stands out. Western is mostly white. She knows from being in class that there are many young transfer students whose aid is not denied. In past quarters, [REDACTED] has had to provide info about her children if they are her dependents. [REDACTED] doesn't know if the government said she was eligible for aid; she thinks it was a university decision. She has never met with Financial Aid.</p> <p>[REDACTED] wants to know why other students with the exact same problem who are transfer students with AA degrees do not have to fight for financial aid. She feels she addressed all of Financial Aid's concerns. She wants to know why she was turned down and wants to be reinstated for next quarter.</p> <p>Laura said she would email [REDACTED] the meeting notes for [REDACTED] review, and would talk with Clara Capron and call [REDACTED] back when Laura has answers.</p>
9/17	Email [REDACTED] to LE	[REDACTED] confirmed that the notes LE sent "accurately condenses our conversation."
9/18	LE t/c Rick Stefani	<p>Review role of EOO: neutral investigators; EOO shares info only on need to know basis, but records may be requested under public records request or court order. Retaliation prohibited.</p> <p>[REDACTED] needs the degree evaluation form. \$43 fee is a one-time fee, so would be waived the next time (right before graduation). Rick thinks Nancy Anderson, lead degree evaluator, or Dixie Duran in Registrar's Office, will waive the late fee for financial aid.</p> <p>Degree evaluation form needed because when a student has reached the maximum attempted credits, financial aid is limited to only those credits needed for graduation. The major evaluation tells what is outstanding for the major, and the Registrar's Office checks for outstanding GUR credits.</p> <p>The student submits petition documents. If the Financial Aid Counselor can approve it based on the paperwork alone, then the matter is done. If the Counselor can't determine whether to approve, or needs to deny, then the petition is brought to a committee of all financial aid counselors and financial aid administrators, minus the directors. The student's academic history is explained; the committee looks at the number of credits attempted and the completion record. Age is not brought up. Rick does not recall protected characteristics being part of the discussion.</p> <p>Rick thinks [REDACTED] should call him soon. She should call him directly at x2405; he usually arrives at 6:15 a.m. She will need to submit the degree evaluation. [REDACTED] is not enrolled right now. If she wants to enroll for winter, no urgency. But if she wants to enroll for fall, she needs to talk with Rick by Monday. Rick suggests</p>

		■■■■ check with Admissions b/c if she misses a quarter she may need to reapply.
9/19/13	LE t/c to ■■■■	Left message pls call, I did get some answers from financial aid, have some follow up questions, but want to give you an update, pls call when you get a chance.
9/20/13	LE out, Sue sent email to ■■■■	See email in file.
9/24/13	LE t/c to ■■■■	<p>"Received email and do understand, realize that it was a technical issue."</p> <p>LE are you planning on doing degree evaluation? "Not for fall, so late, already turned in availability to work."</p> <p>LE: looks like having an incomplete application is a legitimate, nondiscriminatory reason for the denial of aid. Does that seem reasonable to you?</p> <p>"I guess I understand that. It's just a technicality, not discrimination"</p> <p>LE reviewed notes from conversation with Rick Stefani. Encouraged ■■■■ to consult with Rick Stefani, registrar's office and admissions regarding whether she would have to reapply if she waits until winter quarter and to see all of those offices as resources to her.</p> <p>LE will close discrimination case.</p>
9/24/05	LE t/c to Rick Stefani	Left message re LE's t/c to ■■■■
9/24/13	LE t/c to Clara Capron	Left detailed message, closing file, no finding of discrimination.
		Sue updates Provost/President